

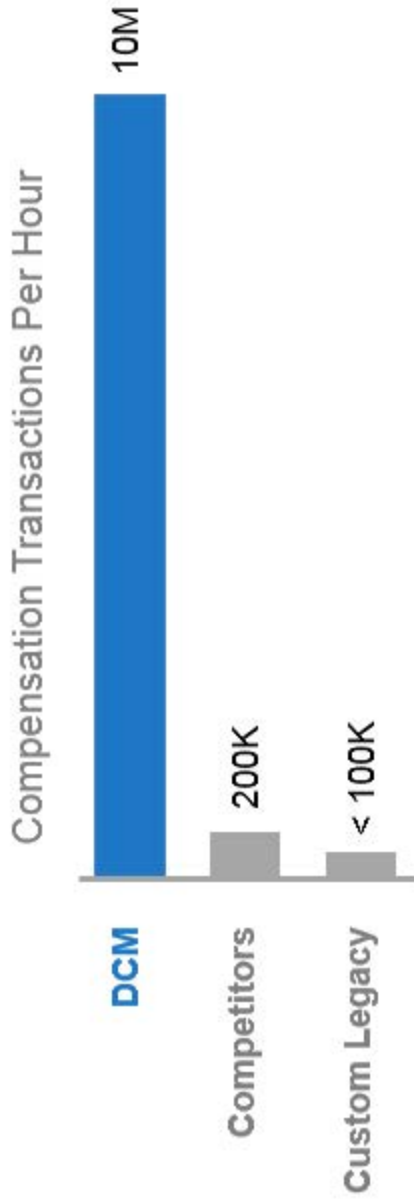


TRILOGY

Insurance  
& Financial  
Services

Scale

## MAXIMUM TRANSACTION PROCESSING SPEED

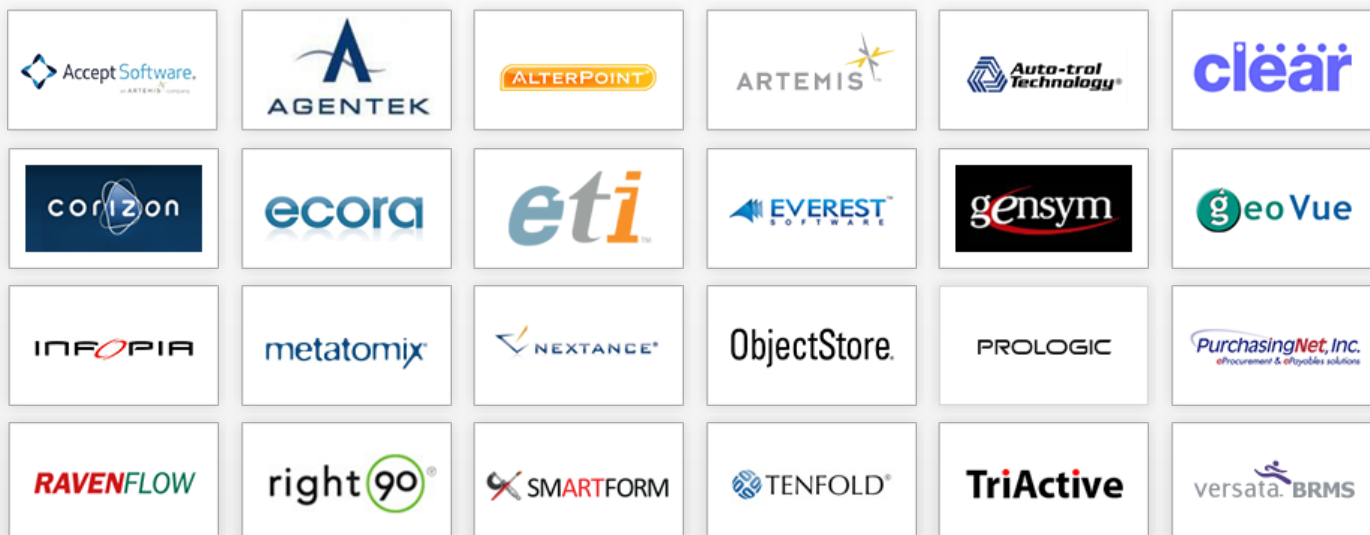


DCM's massive scale advantages mean our customers can consolidate dozens of comp systems to one – saving millions in IT cost & reducing complexity

Looking for [Versata BRMS \(http://brms.versata.com/\)](http://brms.versata.com/) or [Trilogy Financial Services \(http://finserve.trilogy.com/\)](http://finserve.trilogy.com/)?



## REVITALIZING COMPANIES



### Our Mission

Versata invests capital and operational excellence to revitalize world-class software and technology companies for sustainable success.



### 100% Customer Success

Each Versata company puts customers first with a simple lead objective – 100% of customers declaring success.

[Learn More](#) ▶



### DevFactory Development

The world's first software factory powers all Versata companies for sustainable innovation with dramatic cost savings.

[Learn More \(http://www.devfactory.com\)](http://www.devfactory.com) ▶



### Industry Solutions

Versata's industry solutions group is now called **Trilogy** (<http://www.trilogy.com>). See how our **Automotive** (<http://automotive.trilogy.com>), **Insurance & Financial Services** (<http://finserve.trilogy.com>), and **Telecom Technology & Media** (<http://telecom.trilogy.com>) teams are transforming industries through technology.



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Solutions

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DISTRIBUTION CHANNEL MANAGEMENT

([HTTP://AUREA.COM/INDUSTRY-SOLUTIONS/DCM/](http://aurea.com/industry-solutions/dcm/))

# Distribution Channel Management

Aurea Distribution Channel Management (DCM) simplifies and streamlines producer administration across the lifecycle, from onboarding and appointments through to compensation.

- » Get a global view of all producer data to make better decisions and ensure compliance
- » Accelerate producer productivity to boost revenue and retention
- » Scale to millions of transactions per hour to keep up with the speed of business

Unlike most providers, Aurea includes everything you need to succeed into DCM - software, services, support and even hardware - with a single, fixed annual fee. Cloud and mobile innovations extend the reach, flexibility and power of DCM.

## Visibility, Insight and 100% Compliance

Complete visibility and guaranteed compliance put all minds at ease. DCM integrates to a host of federal and state regulatory data sources, including NIPR and FINRA. Compensation modeling and analytics let you evaluate the impact of plan changes across all transactions for an entire year.

## Built-in Agility

Simplified tools with a modern interface enable you to onboard producers in days instead of weeks. Quickly define and introduce new product and compensation plans in as little as a week.

## Hard-wired for Speed

DCM is proven in processing the workloads of the largest carriers on the planet - over 25 million transactions per hour. Eliminate the risk of nightly batch cycles running too long.


<http://www.aurea.com/pressrelease/20131013>

[http://www.limra.com/Events/Conferences/2014/2014\\_Distribution\\_Conference](http://www.limra.com/Events/Conferences/2014/2014_Distribution_Conference)

### Industry Solutions

Insurance  
(<http://www.aurea.com/industry-solutions/insurance/>)  
Distribution Channel Management  
(<http://www.aurea.com/industry-solutions/insurance/dcm/>)

### Technology Solutions

Enterprise Service Bus  
(<http://www.aurea.com/technology-solutions/enterprise-service-bus/>)  
Business Process Management  
(<http://www.aurea.com/technology-solutions/business-process-management/>)  
Model-based Data Integration  
(<http://www.aurea.com/technology-solutions/data-integration/>)  
Application Performance Monitoring  
(<http://www.aurea.com/technology-solutions/application-performance-monitoring/>)

### Products by Brand

Sonic  
(<http://www.aurea.com/technology-solutions/enterprise-service-bus/>)  
Savvion  
(<http://www.aurea.com/technology-solutions/business-process-management/>)  
DataXtend SI  
(<http://www.aurea.com/technology-solutions/data-integration/>)  
Actional  
(<http://www.aurea.com/technology-solutions/application-performance-monitoring/>)

### Services & Support

Support Login  
(<http://www.aurea.com/services-and-support/support/>)  
Platinum Program  
(<http://www.aurea.com/services-and-support/platinum-program/>)

### About Aurea

Our Philosophy  
(<http://www.aurea.com/customer-success/our-philosophy/>)  
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(<http://www.aurea.com/about-us/news/>)  
Events  
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# Insurance Solutions: Manage Your Key Business Processes

Everything from low interest rates, to changing demographics, to M&A, to new competition and stricter regulations are disrupting the insurance industry.

Aurea Insurance Solutions are purpose built to enable the largest carriers and brokerages to manage and improve the performance of distribution channels and processes.

Aurea Insurance Solutions are designed to tackle the industry's biggest challenges:

- » Increased choices for both consumers and producers have massively scaled channel size, complexity and transaction volume
- » Evolving, and burdensome regulatory requirements are present at all levels
- » Legacy infrastructure and skills have difficulty keeping up with these dynamic scenarios and can throttle growth

Aurea Insurance Solutions combine deep industry expertise and long-term relationships with innovation to transform these challenges into opportunities. The result? Improved profitability and retention, with lower costs across the entire producer lifecycle.

## Increase Agility to Double Profitability

On-board producers in days, and use analytics to match them to the right products and plans. Launch new products and compensation plans in weeks instead of months. Make business easy for your producers.

## Meet Compliance Requirements and Reduce Risk

Ensure complete visibility and 100% automated compliance with all federal and state regulatory agencies, including NIPR and FINRA.

## Lower Costs and Drive Efficiency

Reduce the cost of managing your producers across the lifecycle by up to 80% - and watch its effect on your bottom line. Harness cloud and mobile technology while optimizing critical infrastructure.

Aurea Insurance Solutions provide comprehensive compensation and producer lifecycle management capabilities to fuel your growth. With Aurea Distribution Channel Management, you can streamline onboarding, make better decisions, and pay the right people at the right time – all while meeting the regulatory and compliance requirements that come with the territory.

**AUREA LAUNCHES  
INSURANCE SOLUTIONS**

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(<http://www.aurea.com/pressrelease/20131013>)

FEBRUARY 19-21, 2014

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# News



## Aurea Software Launches Insurance Solutions Through merger with Trilogy Insurance & Financial Services

**Extensive industry expertise fuses with innovative technology for enhanced customer operations**

**AUSTIN, Texas — October 22, 2013** — Aurea™, an intelligent business management solution provider, today announced the launch of its Insurance Solutions vertical through its merger with Trilogy Insurance & Financial Services. Aurea Insurance Solutions will operate as a division of Aurea and continue to be led by distinguished industry veteran **Joe Kelley**.

"Aurea's added talent and resources have already accelerated the evolution of our Distribution Channel management ([DCM \(/industry-solutions/insurance/distribution-channel-management/\)](/industry-solutions/insurance/distribution-channel-management/) solution, which is core to our customers' operations," said Mr. Kelley, president, Aurea Insurance Solutions. **"By merging with Aurea, we enhance our ability to present innovative offerings to our customers. Uniting these two forces will help them seize new opportunities and tackle the challenges of today's dynamic insurance market to achieve breakthrough results."**

[Aurea Insurance Solutions \(/industry-solutions/insurance/\)](/industry-solutions/insurance/) customers enjoy a range of competitive advantages:

- » **Increased agility.** Greater speed and flexibility enable them to launch new products and compensation plans in weeks instead of months. Insurance carriers can on-board producers in days and use analytics to match them to the right products and plans
- » **Easier compliance and reduced risk.** Customers gain 100 percent automated compliance with all federal and state regulatory agencies, including NIPR and FINRA, to ease the regulatory burden.
- » **Lower costs and higher efficiency.** Aurea customers can reduce the cost of managing producers across the lifecycle by up to 80 percent. They improve producer productivity while building stronger relationships and increasing retention.

**"Aurea focuses on outcomes derived from meaningful, customer-specific business success metrics,"** said Scott Brighton, CEO of Aurea. "Applying the talent, resources and innovation from Aurea to dig even deeper into the insurance industry speaks to the formula we believe is required to achieve 100 percent customer success."

## About Aurea

Aurea helps customers enable critical, high-value business processes with innovative technology and deployment know-how in intelligent business process management, application and data integration software. With over 1,500 customers worldwide, Aurea combines a maniacal focus on customer success with the world's most powerful enterprise software.

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